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Turkey Production

A significant amount of meat from turkeys is produced each year in the world, despite the fact it is often overlooked in favor of another bird, the chicken. A sharp rise in production, imports, and exports of turkey meat has been seen from 1994 to 2003. However a decrease was seen from 2002 to 2003 in world turkey meat production, imports, and exports. World production of turkey meat in 2003 was 5,241,414 metric tons (MT), which was 141,865 MT below production in 2002 (-2.6%) and 976,428 MT above 1994's production (+22.9%).

Presently, the United States (U.S.) leads the world in the production of turkey meat producing approximately 48.3 percent, accounting for nearly 15 percent of the U.S.'s poultry meat. U.S. turkey production is expected to increase 3 percent in 2005, especially in light of growing demand from Mexico and Taiwan for mechanically separated meat (MSM.) Following the U.S. in turkey meat production in metric tons are France, Germany, Italy, and the UK. In regards to head produced, the leading countries are the U.S., France, Germany, Italy, UK, and Brazil. Leaders by way of the percentage of turkey meat production to total poultry production are as follows: Slovakia (56.6%), Germany (37.5%), Italy (33.2%), France (31.6%), and Israel (24.6%).

World imports and exports of turkey meat have also seen changes from 1994 to 2003 and from 2002 to 2003. Imports of turkey meat in the world were at 918,784 MT in 2003, which was 15,313 MT below 2002 (-1.6%) and 468,831 MT above 1994 (+102%). In 2003 the leading importer of turkey meat was Mexico with 149,934 MT in 2003, accounting for 16.3 percent of the world's turkey meat imports. Most of Mexico's turkey imports come from the U.S. and are comprised of mostly turkey cuts and processed products.

The Russian Federation, Germany, China, and Belgium followed behind Mexico in world imports of turkey meat by quantity. Russia's turkey imports are forecast to decrease as market access tightens under the poultry import quota effective January 1, 2004. Under the import quota, importers are expected to place a greater emphasis on broiler meat, pushing Russian turkey imports down to 80,000 tons in 2005. In regards to turkey meat imports as a percent to total poultry imports, Benin (42.2%), Mexico (30.8%), Spain (26.2%), Belgium (22.0%), and South Africa (22.0%) led the way.

Leading Countries in Turkey Meat Production 2003 (1,000 MT)

Country	Total Turkey Meat MT	Turkey Meat Million Head	Total Poultry Meat	% of Poultry Meat
World	5,241	686	76,394,501	6.9
USA	2,529	268	17,503,755	14.5
France	635	99	2,010,700	31.6
Germany	361	40	963,000	37.5
Italy	340	35	1,022,843	33.2
UK	229	23	1,569,987	14.6
Brazil	200	31	7,967,280	2.5
Canada	145	22	1,091,300	13.3
Israel	113	17	458,730	24.6
Hungary	90	14	438,600	20.5
Slovakia	72	17	127,260	56.6

Source: FAO/USDA FAS

World exports of turkey meat in 2003 were at 881,512 MT, which was 62,675 MT below 2002 (-6.6%) and 362,120 MT higher than 1994 (+69.7%). France led world exports of turkey meat by quantity at 230,818 MT in 2003, accounting for 26.2 percent of the world's turkey meat exports. Following France was the U.S., Brazil, Italy, and the Netherlands. Brazilian turkey exports are forecast at 155,000 tons an increase of 21 percent from 2004. Regarding turkey meat exports to total poultry exports the world leaders were Italy (44.9%), France (33.6%), Hungary (24.7%), Poland (20.9%), and Germany (14.1%).

Source: FAO/USDA FAS/Newswires

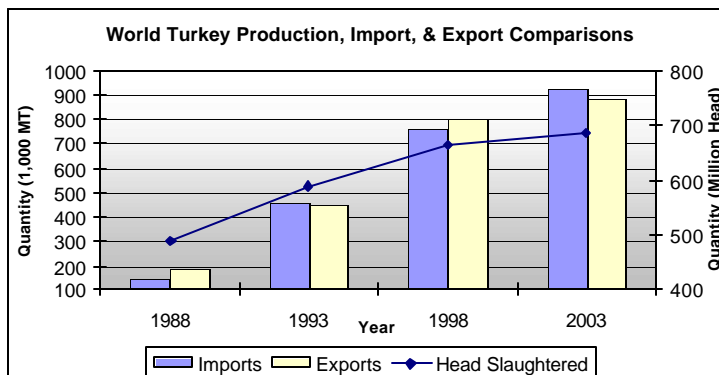
Turkey Production Comparisons in Leading Countries (1,000MT)

Country	1994	2003	Percent Change	2002	2003	Percent Change
World	4,265	5,241	23.0	5,383	5,241	-2.6
USA	2,239	2,529	13.0	2,557	2,529	-1.1
France	568	635	12.0	695	635	-8.7
Germany	194	361	86.0	366	361	-1.4
Italy	269	340	26.0	340	340	0.0
UK	268	229	-15.0	232	229	-1.3
Brazil	75	200	166.0	182	200	9.9
Canada	133	145	9.0	146	145	-1.0
Israel	97	113	17.0	125	113	-9.6
Hungary	26	90	241.0	120	90	-25.0
Slovakia	23	72	210.0	72	72	0.0

Turkey Import & Export Comparisons in Leading Countries (1,000MT)

Imports			Exports		
Country	2003	% of Poultry	Country	2003	% of Poultry
	Turkey	Meat		Turkey	Meat
World	919	9.9	World	882	8.7
Mexico	150	30.8	France	231	33.6
Russia*	113	9.4	USA	203	7.3
Germany	94	18.7	Brazil	110	5.3
China	86	12.4	Italy	50	44.9
Belgium	37	22.0	NL**	44	5.5
Benin	34	42.2	Germany	42	14.1
Spain	31	26.2	UK	35	13.2
Hong Kong	30	3.8	Hungary	33	24.7
UK	29	5.4	Hong Kong	29	5.4
South Africa	27	22.0	Poland	21	20.9

* Russian Federation **Netherlands



Source: FAO/USDA FAS

INSPECTED EGG PRODUCTS-U.S. & CANADA EXPORT/IMPORT TRADE U.S./CANADIAN LIVE POULTRY SLAUGHTERED UNDER INSPECTION

*See page 3 for 15-Jan-05 Data.

W/E 08-Jan-05 (PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY**U.S. EXPORTS TO CANADA, IN POUNDS (000) (PRELIMINARY)**

Week Ending January 8, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Liquid	153	49	153	49
Frozen	0	0	0	0
Dried	6	0	6	0
Total	159	49	159	49

	Light Hens	Heavy Hens	Total Hens
	THOUSANDS		
Head	1,471	1,483	2,954
Last Week	1,345	1,287	2,632
Same week yr ago	1,258	1,312	2,570
To-date/2005	1,471	1,483	2,954
To-date/2004	1,258	1,312	2,570

U.S. IMPORTS FROM CANADA, IN POUNDS (000) (PRELIMINARY)

Week Ending January 8, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Liquid	174	118	174	118
Frozen	7	3	7	3
Dried	40	0	40	0
Total	221	121	221	121

U.S. FOWL SLAUGHTERED IN CANADA

	Light Hens	Heavy Hens	Total Hens
	THOUSANDS		
Head	301	0	301
Last Week	127	0	127
Same week yr ago	343	0	343
To-date/2005	301	0	301
To-date/2004	343	0	343

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

INSPECTED SHELL EGGS**U.S. EXPORTS TO CANADA, IN 30-DOZEN CASES (PRELIMINARY)**

Week Ending January 8, 2005	Year-To-Date			
TYPE	2005	2004 1/	2005 2/	2004
Jumbo	0	50	0	50
Extra Large	0	0	0	0
Large	550	2,093	550	2,093
Medium	600	30	600	30
Ungraded	0	0	0	0
Misc	0	0	0	0
Total	1,150	2,173	1,150	2,173

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	Light Hens	Heavy Hens	Total Hens
	THOUSANDS		
Head	1,772	1,483	3,255
Last Week	1,472	1,287	2,759
Same week yr ago	1,601	1,312	2,913
To-date/2005	1,772	1,483	3,255
To-date/2004	1,601	1,312	2,913

Source: USDA/AMS Poultry Programs, Market News Branch

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

JANUARY 21, 2005

CHICKEN WITH SKIN ADDED

		---- PRICES ----		---- VOLUME ----	
FAT					
CONTENT	FROZEN	FRESH	TOTAL	EXPORT	
15% OR LESS					
RANGE	-	19.00	122,400	-	
WTD AVERAGE		19.00			
15-20%					
RANGE	13.75-17.75	11.50-18.00	2,901,600	1,327,200	
WTD AVERAGE	16.17	14.21			
20% OR MORE					
RANGE	-	14.50	122,400	-	
WTD AVERAGE		14.50			

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

JANUARY 21, 2005

CHICKEN WITH SKIN ADDED

		---- PRICES ----		---- VOLUME ----	
FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT	
15% OR LESS					
RANGE	18.50	18.50-22.00	540,000	260,000	
WTD AVERAGE	18.50	20.00			
15-20%					
RANGE	16.00-22.00	13.75-20.00	2,466,000	1,146,000	
WTD AVERAGE	19.67	15.58			
20% OR MORE					
RANGE	-	13.25-17.50	160,000	-	
WTD AVERAGE		14.31			

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

U.S. /CANADIAN LIVE POULTRY SLAUGHTERED UNDER INSPECTION Week Ending 15-Jan-05**U.S. FOWL SLAUGHTERED DOMESTICALLY**

	Light Hens	Heavy Hens	Total Hens
	THOUSANDS		
Head	1,625	1,219	2,844
Last Week	1,471	1,483	2,954
Same week yr ago	1,526	1,278	2,804
To-date/2005	3,096	2,702	5,798
To-date/2004	2,784	2,590	5,374

U.S. FOWL SLAUGHTERED IN CANADA

	Light Hens	Heavy Hens	Total Hens
	THOUSANDS		
Head	428	0	428
Last Week	301	0	301
Same week yr ago	346	0	346
To-date/2005	729	0	729
To-date/2004	689	0	689

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	Light Hens	Heavy Hens	Total Hens
	THOUSANDS		
Head	2,053	1,219	3,272
Last Week	1,772	1,483	3,255
Same week yr ago	1,872	1,278	3,150
To-date/2005	3,825	2,702	6,527
To-date/2004	3,473	2,590	6,063

Source: USDA/AMS Poultry Programs, Market News Branch

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 21 JAN, 2005.

The market tone on fresh and frozen tom breast meat and frozen destrapped tenders was barely steady to weak. Fresh destrapped tenders and whole tenders mostly steady. Breast trim steady to firm. Offerings were adequate except for breast trim which is short of needs. Demand remains seasonally light. Export trading was light to moderate. Inquiry was moderate. Buyers and sellers remain cautious toward the market. For export fresh thigh meat 89 - 89.5 cents. Whole tenders 153 cents. For domestic fresh scapula 122- 128.5 cents, fresh wing meat 117 cents, livers 23 cents and gizzards 59 cents.

FRIDAY, JAN 21, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	37.00-39.00		37.49	858	37.56	1,153
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS	23.00		23.00	162	23.00	177
MECHANICALLY SEPARATED 2/	19.00		19.00	80	19.00	80
THIGH MEAT - FROZEN	87.00		87.00	40	87.62	130

THURSDAY, JAN 20, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	39.00		39.00	15
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	23.00		23.00	15
MECH. SEPARATED 2/		F	19.00	80
THIGH MEAT - FROZEN	87.00		87.00	10

WEDNESDAY, JAN 19, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	37.00-39.00		37.67	240
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECH. SEPARATED 2/		F	19.00	80
THIGH MEAT - FROZEN	88.00		88.00	80

TUESDAY, JAN 18, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	38.00		38.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECH. SEPARATED 2/		F	19.00	80
THIGH MEAT - FROZEN		F	86.00	120

MONDAY, JANUARY 17, 2005**NO EXPORT TRADING REPORTED DUE TO THE OBSERVANCE OF MARTIN LUTHER KING, JR. HOLIDAY**

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

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